

October 14, 2005

Dear Colleague:

The Los Angeles County Children's Planning Council invites you to consider this Request for Qualifications (RFQ) to work with the Council in managing and operating the Earned Income Tax Credit (EITC) information and referral telephone service to answer questions related to EITC, the Child Tax Credit (CTC), and refer clients to Volunteer Income Tax Assistance sites and other programs or services that can assist families in increasing their assets.

The attached Request for Qualifications (RFQ) provides the necessary information of the requirements to be considered for this project. We encourage you to share this RFQ with organizations that meet the qualifications for providing the needed service.

For additional information or questions, please contact me at 213-974-7404.

Sincerely,

Marco A. Martinez
EITC Coordinator

Attachment



Request for Qualifications

The Los Angeles County Children's Planning Council invites submissions of your organization's qualifications for an **Earned Income Tax Credit (EITC) information and referral telephone service** to answer questions related to EITC, the Child Tax Credit (CTC), and refer clients to Volunteer Income Tax Assistance sites and other programs or services that can assist families in increasing their assets.

RESPONSES TO THIS RFQ ARE DUE BY 5:00 P.M. OCTOBER 31, 2005

INTRODUCTION

The Los Angeles County Children's Planning Council (CPC) is seeking a qualified candidate to contract with the CPC to operate a telephone answering and referral system for the EITC Campaign Partnership during the period January 1, 2006 to April 30, 2006. This RFQ provides an overview of the scope of work and what will be required of the contractor in performing the work. Up to \$40,000 from the County of Los Angeles has been earmarked for this five-month project, with an option for an extension of the contract to continue through the remainder of the year for additional services.

Overview of the Los Angeles County Children's Planning Council

The Los Angeles County Children's Planning Council is a countywide public/private collaborative created by the Los Angeles County Board of Supervisors in 1991. It is dedicated to improving the lives of children and families by encouraging partnerships, supporting public/private collaborations, strengthening communities, promoting the use of data, developing resources and tools, and emphasizing the importance of outcomes and results. Our goals are to build stronger and more effective systems that serve families and children, build linkages between government and community, impact policy, engage communities and residents, and improve planning efforts so that we increase the probability of successful actions that enhance child and family well-being throughout Los Angeles County.

The Council's work is guided by our Vision for Children and five outcome areas of child well-being: good health, safety and survival, social and emotional well-being, economic well-being, and education/workforce readiness. *For the Council, positive outcomes in these areas are the bottom line.*

Overview of the EITC Campaign Partnership

The EITC Campaign Partnership (Partnership) was established in 1997 as a collaborative of various public, private, and non-profit organizations whose mission it is to increase awareness and participation in the Federal Earned Income Tax Credit. The Partnership is currently expanding its focus of increasing the economic opportunities of low-income families, children, and individuals by pursuing a broader family economic success agenda.

Currently, the Partnership seeks to increase assets for low-to-moderate income workers, and the greater Los Angeles economy, by increasing participation and awareness of the Federal Earned Income Tax Credit through innovative partnerships and collaborative marketing.

HOTLINE OBJECTIVES

As part of the County's project to increase participation in the EITC Campaign, Contractor shall manage a toll-free telephone number, to be provided by the Children's Planning Council, to provide callers with information on the EITC and other related programs, services, and supports that will assist families in increasing their assets. Hotline will be owned and originated by the Children's Planning Council.

SCOPE OF WORK (Minimum Requirements)

The selected Contractor will be responsible for the following:

1. Capacity to handle up to twenty thousand (20,000) calls per year;
2. Hotline services shall be provided Monday through Friday from 8:00 a.m. to 8:00 p.m. and on Saturday from 9:00 a.m. through 3:00 p.m.;
3. Hotline services shall be available in the nine threshold languages of the County of Los Angeles (English, Armenian, Cambodian, Chinese, Korean, Russian, Spanish, Tagalog and Vietnamese);
4. Hotline services shall include the following:
 - a. Assess eligibility for EITC, VITA, and Child Tax Credits.
 - b. Referrals to Volunteer Income Tax Assistance (VITA) or to legal clinics for free tax form preparation services.
 - c. Scheduling of appointments to EITC Campaign Partnership VITA sites.
 - d. Provide referrals and information to other related programs, services, and supports including, but not limited to, Financial Education, WorkSource Centers, and banking services and institutions.
 - e. Information to employers on their employees' eligibility for receiving the Advanced Earned Income Tax Credit (AEITC).
 - f. Voicemail service options (preferably in multiple languages) for callers and after-hours calls with responses by the next business day.
 - g. Response to email inquiries by the next business day.

5. Data Collection: Contractor must complete and submit monthly reports to CPC, which includes number of callers, zip codes, responses to survey questions, and the services they were assisted with and referred to. All data collection instruments (surveys, interview questions) will be provided by the Children's Planning Council. All data collected should be organized and documented sufficiently and reported to the CPC EITC Coordinator by the last working day of every month.
6. Obtain and pay for toll free number for the hotline. Toll free number will be owned by the Children's Planning Council.

RFQ SUBMISSION REQUIREMENTS

The following pieces must arrive no later than October 31, 2005:

1. Cover Letter
2. Contractor Profile
3. Work Plan
4. Budget
5. W-9 Form and/or Tax ID number
6. Appendix A: References
7. Appendix B: Resumes of Executive Staff
8. Appendix C: Employee Selection and Training Criteria

Each response must be organized in an indexed binder ordered in the same manner as the response items are ordered in the list above. An identifiable tab sheet must precede each section; identifiable headers and an index must be included in an electronic version.

Cover Letter (Limit: 2 pages)

The cover letter must be in the form of a standard business letter and must be signed by an individual authorized to legally bind the bidder. The cover letter should provide a statement of interest pertaining to this project and include the name, phone number, and an email address of a contact person.

Contractor Profile (Limit: 3 pages)

Each response must include a profile of the respondent's relevant experience operating a telephone hotline pertaining to tax assistance and/or EITC assistance. Describe how your organization meets the specific requirements for the hotline that are described below. Please be as specific and informative as possible in responding to each point.

1. Substantial experience and capacity in the operation of services directly relevant to the scope of this project;
2. Language capability in responding to and assisting clients with EITC, VITA and other tax needs;
3. Demonstrated expertise in telephone information and referral services;

4. Demonstrated ability to effectively manage a project of this type;
5. A track record of sound performance on jobs of this nature;
6. Any special experience, knowledge, or skills that uniquely qualify you/your organization for this project. Please list references from previous clients (Appendix A).

Proposed Methodology (Limit: 3 pages)

Respondents are asked to specify the activities they will undertake to perform the duties outlined in this RFQ. Describe advantages and disadvantages of the approaches you recommend, and specify the cost implications, if any.

Work Plan (Limit: 3 pages)

The respondent is expected to provide a tentative work plan that specifies the key tasks to be completed for the implementation and management of the EITC hotline, including answering emails inquiries and providing referrals to other programs and services. Include a brief discussion about the challenges and possible problems you would anticipate, and how you would propose to handle them.

In the work plan, the bidder should describe the support it wants from the CPC. The CPC may not be able to provide all the support the respondent lists in this part of its response. Thus, the respondent should indicate which support is a requirement for its performance.

Budget (Limit: 1 page)

Specify the total cost for the EITC hotline. Total costs should include toll free number, service fees for calls*, salaries, fringe benefits, contracted services for staff who are not direct employees, supplies and materials including indirect costs. Indirect costs should be specified and should not exceed 7% of the total contract. The bidder must give the address to which payments to the bidder will be sent. Funds available for the telephone hotline project shall not exceed \$40,000 for a four month period, with an option for an extension of the contract to continue through the remainder of the year.

W-9 Form

The bidder must either completed W-9 form in its entirety or submit their Tax ID number to the CPC. At least one W-9 form with an original signature must be submitted.

SELECTION PROCEDURE/DESCRIPTION OF PROCESS

Responses to the RFQ are due on or before 5:00 p.m., October 31, 2005. Responses after this deadline will not be accepted. All documents are to be submitted in 8 ½" x 11" page size.

* CPC will provide information on the cost for the average call

Please provide five (5) identical copies of your submittal, one (1) copy loose and four (4) copies bound. The name and address for submission of all materials is provided at the end of this section.

The process is described below:

1. RFQ released on October 12, 2005. Estimated scope is \$40,000 for a five month period.
2. If interviews are required to assist in making the selection, short listed organizations will be notified.
3. A selection committee will evaluate submittals. Interviews, if required, will be conducted in Los Angeles, California.
4. After evaluation of RFQ submissions, the Committee will develop a prioritized short list of 3-5 applicants. The top ranked organization will be recommended to the EITC Campaign Partnership and the Children's Planning Council for approval and authorization to begin contract negotiations.
5. It is anticipated that a contract with the selected firm will be finalized by November 18, 2005.
6. The Children's Planning Council reserves the right to reject any or all qualifications at any point during the selection process.

Please address submissions to:

Marco Martinez
EITC Coordinator
Los Angeles Children's Planning Council
500 W. Temple Street, B26
Los Angeles, CA 90012

EVALUATION CRITERIA (How RFQs will be evaluated)

The submission of interest and qualifications for this project will be evaluated based on the following criteria. Criteria are weighted as indicated below:

1. Demonstrated experience and track record (30%)
Submittals will be evaluated according to demonstrated experience of the respondent in providing telephone information and referrals in multiple languages. . In addition, the proposal will be evaluated for the organization's track record in fulfilling their agreements, including providing service in a timely, respectful manner and during the period (days and times) agreed to with other clients.

2. Demonstrated creativity and flexibility (10%)

Respondents should illustrate strong capability to respond to unforeseen issues. Proven capability to assess situations quickly, communicate effectively, and provide innovative solutions for callers will be important qualifications for this consultant.

3. Creativity and qualifications of key individuals (25%)

Submittals will be evaluated carefully in terms of exactly what personnel will be committed to this project and what their qualifications are for producing successful results.

4. Organizational and project approach (25%)

Submittals will be carefully evaluated in terms of how the consultant/consultant team will accomplish the management and operation of the hotline. Organizational composition, experience in working together and with a diverse clientele, integration and clarity of the role(s) of the various team members, and proposed interface with CPC staff and the EITC Campaign Partnership will be key factors in the evaluation of the submittals.

5. Responsiveness (10%)

Submittals will be evaluated on how completely they respond to the RFQ and to any additional information which may be issued by the Children's Planning Council prior to the RFQ submission date.

SCHEDULE

The Council anticipates the EITC Hotline will be operated over a 4-month period beginning on January 1, 2006 and ending on April 30, 2006, with the possibility to extend the contract up to a year for additional hotline services. The Council may change this schedule at any time.

October 13	RFQ issued
October 31	Due date for Qualifications
November 18	Contractor selected and notified
December 5	Contract awarded

AVAILABLE RESOURCES

1. Children's Planning Council Website: www.childrensplanningcouncil.org
2. EITC Campaign Partnership Website: www.eitc-la.com